

## WITS Voucher Management System (VMS)

## User Guide and Manual

► **The WITS Voucher Management System (VMS)** is a web based application specifically designed for organizations with a need to effectively manage their ATR 3 programs. Capable of creating and managing contracts, vouchers, and funds, WITS VMS also comes with core clinical features essential to managing substance abuse recovery services and treatment case management.

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## *A. Provider*

## 1. Reviewing Referrals in an Agency



Where: Agency > Agency List > Referrals > Referral In



**Start:** If you have clients which have been referred to your Agency, you will see an alert notice appear on the Home page. To review these referrals, simply click on the **Agency** link followed by the **Agency List** link located in the left side navigation.

1. Once in the **Agency List**, click on the Referrals Link followed by the **Referrals In** link.
2. From the "Referrals Search" screen, select your search criteria from the "Referral Status Codes" box and move them to the "Search Criteria" box by clicking the **>** button.
3. When you have selected all of your search criteria, click on the **Go** button to generate your search results list.
4. Notice that any referred clients will appear in the bottom portion of the screen. At this point you can click on the **Review** link to view the referral information.

**Home** WITS Version : September 2010

There are currently 1 people that have been referred in.

**Announcements**

Summary	Posted Date	Start Date	Priority	Actions

**Referrals for LLH Provider Facility 1 (Export)**

**Referral Status Codes**      **Search Criteria**

Placed/Accepted  
Referral Created/Pending  
Referral Terminated  
Refused Treatment

Client Id  Created Date  Referred Date

First Name  Last Name

**Clear** **Go**

Actions	Client ID	Client	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comment
<a href="#">Review</a>	F059532IM656111	Mint, Martha	10/15/1965	9/23/2010	LLH Case Manager/LLH CM Facility 1	Recovery Support Services	Placed/Accepted	LLH Provider Facility 1	
<a href="#">Review</a>	M459555AB646100	Bailey, Biff	4/5/1965	9/28/2010	LLH New Case Management/LLH NC Facility 1	Recovery Support Services	Placed/Accepted	LLH Provider Facility 1	
<a href="#">Review</a>	F809262MS357110	Smith, Sally	8/10/1972	9/29/2010	LLH New Case Management/LLH NC Facility 1	Recovery Support Services	Placed/Accepted	LLH Provider Facility 1	
<a href="#">Review</a>	F119323OD148100	Doe, Mary	1/1/1983	10/7/2010	SM Case Management 1/Facility 1	Recovery Support Services	Placed/Accepted	LLH Provider Facility 1	
<a href="#">Review</a>	M229043OD698111	Doe, Chris	12/12/1980	11/2/2010	SM Case Management 1/Facility 1	Recovery Support Services	Placed/Accepted	LLH Provider Facility 1	



**Finish:** You have searched and selected a referred client.

## 2. Accepting a Referred Client



Where: Agency > Agency List > Referrals > Referral In



**Start:** Prior to Accepting a referred client, you must first search, select and review the referred client case.

1. When you are reviewing the client referral, you must accept the client into your agency before you can view the client's record or work on the case. To continue, select **"Placed and Accepted"** from the "Referral Status" drop down field.
2. Next, you can fill in the "Appointment Date" and use the drop down box to provide any additional information about the appointment.
3. Click the **Finish** button to save the record and accept the referral. Note that this action takes you to the Client Profile screen for the client you just accepted.
4. Note that you also have the option of choosing from the following list of "Referral Status" reasons:
  - a. **Referred/Terminated** – When the referral has been deleted by the referring agency.
  - b. **Refused Treatment** – Select if the client does not want to be treated.
  - c. **Rejected by Program** – If the client is not eligible or is not acting in compliance.
  - d. **Wait List** – If the client is waiting for a slot to open in the program.



**Finish:** You have searched and selected a referred client.

**Client Referral for Test, Client**

<p><b>Referred By</b></p> <p>Agency: LLH Case Manager</p> <p>Facility: LLH CM Facility 1</p> <p>Staff Member: Thakker, Nishita</p> <p>Program: LLH CM Facility 1/ATR 3 : 9/1/2010 -</p> <p>State Reporting Category: Client declined</p> <p>If Other: </p> <p>Is Consent Verification Required? <b>Yes</b></p> <p>Is Consent Verified? <b>Yes</b></p> <p>Continue This Episode of Care? <b>Yes</b></p>	<p><b>Referred To</b></p> <p>Signed Consents: LLH Provider 1</p> <p>Agency: LLH Provider 1</p> <p>Facility: LLH Provider Facility 1</p> <p>Staff Member: </p> <p>Program: ATR 3</p> <p>State Reporting Category: </p> <p>Non-System Agency: </p> <p>Non-System Modality: </p> <p>Non-System Specifier: </p> <p>2 Appt Date: <input type="text"/> <b>Undetermined</b></p> <p>Granted</p> <p>Consent Date: 11/12/2010</p> <p>Disclosure Domains:</p> <ul style="list-style-type: none"> <li>ADAD (UD, +1)</li> <li>Admission (UD, +1)</li> <li>Behavioral Health Assessment (UD, +1)</li> <li>CAGE-AID Screening (UD, +1)</li> <li>Client Information (Profile) (UD, +1)</li> </ul>
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**Comments**

1 Referral Status: **Placed/Accepted**

Referral Date: 11/15/2010

Projected End Date:

Created Date: 11/15/2010 12:24 PM

**Cancel Finish**

3

**Note:** Once the referral is Placed/Accepted, the client record is created within the Agency, as well as an Intake within the referred to Facility. The intake date will be the same as the referral date.

### 3. Reviewing a Voucher Prior to Accepting a Referral



Where: Agency > Agency List > Referrals > Referral In > Vouchers



**Start:** To review services for a voucher prior to accepting a client referral, you must be in the **Agency** module and the **Referrals In** screen located in the Left side navigation.

1. From the "Referrals Search" screen, select your search criteria from the "Referral Status Codes" box and move them to the "Search Criteria" box by clicking the **>** button.
2. When you have selected all of your search criteria, click on the **Go** button to generate your search results list.
3. Notice that any referred clients will appear in the bottom portion of the screen. At this point you can click on the **Review** link to view the referral information.
4. Next, you will see the "Client Referral" screen. Ignore the **Cancel** and **Finish** buttons; instead, click on the **Voucher** link which should now appear in the Left side navigation.

**Referrals for LLH Provider Facility 2 (Export)**

**Referral Status Codes** **Search Criteria**

Placed/Accepted  
Referral Created/Pending  
Referral Terminated  
Refused Treatment

Client Id  Created Date  Referred Date

First Name  Last Name

**Clear** **Go**

Actions	Client ID	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comment
<b>Review</b>	37100	Test, Client	1/1/1970	11/15/2010	LLH Case Manager/LLH CM Facility 1	Recovery Support Services	Referral Created/Pending	LLH Provider Facility 2	

**Client Referral for Test, Client**

**Referred By**

Agency LLH Case Manager  
Facility LLH CM Facility 1  
Staff Member Thakker, Nishita  
Program LLH CM Facility 1/ATR 3 : 9/1/2010 -  
State Reporting Category  
Reason Client declined  
If Other  
Is Consent Verification Required? Yes  
Is Consent Verified? Yes  
Continue This Episode of Care? No

**Referred To**

Signed Consents LLH Provider 1  
Agency LLH Provider 1  
Facility LLH Provider Facility 2  
Staff Member  
Program ATR 3  
State Reporting Category  
Non-System Agency  
Non-System Modality  
Non-System Specifier  
Appt Date  **Undetermined**

**Consents Granted**  
Consent Date: 11/12/2010  
Disclosure Domains:  
ADAD (UD, +1)  
Admission (UD, +1)  
Behavioral Health Assessment (UD, +1)  
CAGE-AID Screening (UD, +1)  
Client Information (Profile) (UD, +1)

**Comments**

Referral Status **Referral Created/Pending**  
Referral Date 11/15/2010  
Projected End Date   
Created Date 11/15/2010 3:16 PM

**Cancel** **Finish**

Continued on the next page...



Where: Agency > Agency List > Referrals > Referral In > Vouchers

Continued from the previous page...

5. On the "Voucher" screen, you should see the voucher list. Proceed and click on the [Profile](#) link that corresponds to the voucher.
6. Next you will see the voucher screen with the list of vouched services below it. Note that you will not be able to edit any of the voucher
7. Once you have completed reviewing the Voucher, click on the **Finish** button to return to the Voucher screen. Repeat the steps if you wish to review additional vouchers.

### Authorization List

Auth #	Payer	Status	Effective Date	End Date	Encumbered	Expended	Available	Last Activity	Actions
30		Pending	11/15/2010	11/20/2010	0.00	0.00	1150.00	11/15/2010	<a href="#">Profile</a>

### Authorization for Test, Client

Group Enrollment:  Status: Pending

Plan: ATR3 Contract: 47438718734 - Contractor - LLH Provider / 9/1/2010 - 8/31/2011

Authorization # 30 Date Approved: 11/15/2010

Effective Date: 11/15/2010 Updated Date: 11/15/2010 3:16 PM

End Date: 11/20/2010 Updated By: Thakker, Nishita

Comments:

### Authorized Services List

Service	Authorized Units	Encumbered	Expended	Available Units
Housing	10	0.00	0.00	10.00

Actions

Total Authorized: \$1,150.00

Total Encumbered: 0.00

Total Expended: 0.00

Total Available: \$1,150.00



**Finish:** You have now reviewed voucher services prior to accepting a client referral.

## 4. Client Information



Where: Agency > Client List

### Overview:

To search for a client, click on the **Client List** link in the left navigation menu. A blank Client List screen will appear. WITS VMS will search on any fields you fill in, once you click on the **Go** button. The more fields you enter the fewer records the system will return. Try to use unique information, such as birthdates or social security numbers, if possible. You can also enter a partial name (or other field) followed by a "\*". This is called a wild card search. For instance, if you search for Last Name of "Smit\*", you will get people with the last name of "Smith", "Smitty", "Smithson", etc.

Look for your client in the Client List. If you find the right person, pull up the profile by clicking on Profile next to their name

*Continued on the next page...*

Client Search

Agency LLH Provider 1

First Name

SSN

Client ID

Treatment Staff

Case Status All Clients

Other Number

Facility

Last Name

DOB

Provider Client ID

Primary Care Staff

Intake Staff

Number Type

Clear

Go

Client List (Export) Add Client

Client ID	Full Name	DOB	SSN	Gender	Actions
M459555AB646100	Bailey, Biff	4/5/1965	558-45-4565	Male	<a href="#">Profile</a>   <a href="#">Activity List</a>
M229043OD698111	Doe, Chris	12/12/1980	372-82-9463	Male	<a href="#">Profile</a>   <a href="#">Activity List</a>
F119323OD148100	Doe, Mary	1/1/1983	987-65-4213	Female	<a href="#">Profile</a>   <a href="#">Activity List</a>
F059532IM656111	Mint, Martha	10/15/1965	112-12-5362	Female	<a href="#">Profile</a>   <a href="#">Activity List</a>
F809262MS357110	Smith, Sally	8/10/1972	445-42-5632	Female	<a href="#">Profile</a>   <a href="#">Activity List</a>

Clients with Consents from Outside Agencies

Agency	Client ID	Client Name	DOB	SSN	Gender	Actions
LLH New Case Management	M459555AB646100	Bailey, Biff	4/5/1965	558-45-4565	Male	<a href="#">Activity List</a>
SM Case Management 1	M229043OD698111	Doe, Chris	12/12/1980	372-82-9463	Male	<a href="#">Activity List</a>
SM Case Management 1	M229775OD688111	Doe, Lance	12/12/1987	987-09-8765	Male	<a href="#">Activity List</a>
SM Case Management 1	F119323OD148100	Doe, Mary	1/1/1983	987-65-4213	Female	<a href="#">Activity List</a>
SM Case Management 1	M119513OD268100	Doe, Mike	1/1/1985	789-45-6123	Male	<a href="#">Activity List</a>
LLH Case Manager	M279744EH556101	Heller, John	12/7/1967	222-44-5454	Male	<a href="#">Activity List</a>
LLH Case Manager	F059532IM656111	Mint, Martha	10/15/1965	112-12-5362	Female	<a href="#">Activity List</a>
LLH New Case Management	F809262MS357110	Smith, Sally	8/10/1972	445-42-5632	Female	<a href="#">Activity List</a>
LLH Case Manager	F119034ET437100	Test, Client	1/1/1970	111-22-3344	Female	<a href="#">Activity List</a>

**Note!** The History sub-menu displays a list of all changes that have been made to the client information as well as any access to this client's record. It lists the date, the staff person, and a description of the access or change.






Where: *Client List* > *Client Profile*

*Continued from previous page...*



**Start:** To review a client, make sure that you are in the client list screen by clicking on the **Client List** link in the left-hand navigation menu.

1. From the "Client List" screen, click on the **Profile** link. The client profile screen will then appear.
2. In the "Client Profile" screen you can review the client information including "First Name", "Last Name", "Gender", "DOB" and "SSN".
3. To quit the screen and come back to the client List screen, click on the **Finish** button.
4. If you would like to see optional client profile information including **Alternate Name**, **Phone Number** and **Address** and **Additional Information**, click on the  button.

Client List (Export)					
Client ID	Full Name	DOB	SSN	Gender	Actions
M459555AB646100	Bailey, Biff	4/5/1965	558-45-4565	Male	<a href="#">Profile</a>   <a href="#">Activity List</a>
M2290430D698111	Doe, Chris	12/12/1980	372-82-9463	Male	<a href="#">Profile</a>   <a href="#">Activity List</a>
F1193230D148100	Doe, Mary	1/1/1983	987-65-4213	Female	<a href="#">Profile</a>   <a href="#">Activity List</a>
F059532IM656111	Mint, Martha	10/15/1965	112-12-5362	Female	<a href="#">Profile</a>   <a href="#">Activity List</a>
F009987M917111	Mint, Mary	10/10/1979	111-11-1897	Female	<a href="#">Profile</a>   <a href="#">Activity List</a>
F809262MS357110	Smith, Sally	8/10/1972	445-42-5632	Female	<a href="#">Profile</a>   <a href="#">Activity List</a>
F119034ET437100	Test, Client	1/1/1970	111-22-3344	Female	<a href="#">Profile</a>   <a href="#">Activity List</a>

Client Profile for Bailey, Biff

First Name Biff

Middle Name

Last Name Bailey

Mother's Maiden Name

Gender Male

DOB 4/5/1965

SSN 558-45-4565

Driver's License

Has paper file Yes

Provider Client ID

Client ID M459555AB646100

Record Created By Heller, Laura

Last Updated By Heller, Laura

Created Date 9/28/2010 4:09 PM

Last Updated Date 9/28/2010 4:09 PM

Finish

Alternate Names

Last Name	First Name	Middle Name	Actions

Addresses

Address Type	Address	Confidential	Created	Updated	Actions
Client Home	881 Mint Terrace Westminster, MD 21158	No	9/28/2010	9/28/2010	<a href="#">Review</a>



**Finish:** You have now completed reviewing a Client.

## 5. Intake



Where: *Client List* > *Activity List* > *Intake*



**Start:** Make sure that you have selected a client, since everything you do in the Intake will be applied to the client record chosen. To continue, Click on the **Activity List** link located in the left navigation menu. OR from the client List, search for the client and click on **Activity list** under the actions column.

1. Click on the **Intake** link located in the left navigation menu, and the Intake screen will appear.
2. Continue by reviewing the “Intake Facility”, the “Intake Staff” list, as well as the initial contact and the residence. Review Intake date.
3. Quit the screen by clicking on **Finish**.



**Finish:** You have reviewed an intake.

**ATR 3 Intake Case Information for Test, Client**

Intake Facility LLH Provider Facility 2	Case # 1
Intake Staff Thakker, Nishaa	Case Status Open Active
Initial Contact by Appointment	Initial Contact Date
Residence	Intake Date 11/15/2010
	Pregnant No Due Date
Referral Contact	Prenatal Treatment
	HIV Positive
	Problem Area
Inter-Agency Service	Inter-Agency Service Selected
Child Protective Services (OCS)	
Court/Legal Interface	
DCSF	
Developmental Disabilities	
Date Closed	

**Finish**

**Note:** This screen is read only. Your system access doesn't allow you to create new intakes or edit existing ones.

## 6. Viewing Referred Vouchers



Where: [Client List](#) > [Client Profile](#) > [Voucher](#)



**Start:** To review a client voucher, be sure that you have first “Placed/Accepted” the referral. While in the client profile module, click on the **Voucher** link located on the left side navigation.

1. In the “Voucher List” screen you will see a list of vouchers available for the client. To view any of the vouchers, click on the [Profile](#) link.
2. Next, you should see a Voucher screen with a Vouched Services List at the bottom of the page. After you have reviewed the list, choose to either [Accept](#) or [Decline](#) the vouchers using the action links located in the bottom left corner of the screen.
3. If you click on the Accept action link, a message will appear that reads “Are you sure you want to accept this authorization?” Click on the [Yes](#) button to continue.
4. Note that when the voucher is accepted, the “Voucher” screen will reload in the browser and the only action link available will be to [Close](#) the voucher. Click on the [Finish](#) button to complete your selection and to start rendering services and create encounters.



**Finish:** You have viewed and accepted a voucher.

**Voucher List**

Voucher#	Plan	Status	Effective Date	End Date	Vouched Amount	Encumbered	Expended	Available	Last Activity Date	Actions
39	ATR3 [ATR3, 47438718734]	Pending	2/7/2011	3/15/2011	\$60.00	0.00	0.00	60.00	2/7/2011	<a href="#">Profile</a>

**Voucher for Green, Joe**

Group Enrollment: ATR3 Status: Pending

Plan: ATR3 Contract: 47438718734 - Contractor - LLH Provider / 9/1/2010 - 8/31/2011

Voucher #: 39 Date Approved: 2/7/2011

Effective Date: 2/7/2011 Updated Date: 2/7/2011 4:04 PM

End Date: 3/15/2011 Updated By: Heller, Laura

ATR Intake: 2/7/2011-LLH Provider Facility 1

Comments:

**Vouched Services List**

Service	Vouched Units	Vouched Amount	Encumbered	Expended	Available Amount	Available Units
GPRA Assessments	3	\$60.00	0.00	0.00	\$60.00	3.00

**Actions**

[Accept](#) [Decline](#) [Close](#)

**Total Vouched:** \$60.00

**Total Encumbered:** 0.00

**Total Expended:** 0.00

**Total Available:** \$60.00

**Note:** Once the voucher is accepted, its status is set to “Active” and you can start billing against it. If you decline a voucher, its status will be set to “Declined”. The available amount will then be set to \$0 and you will not be able to create any encounters against any of the voucher services.

## 7. Reviewing Vouchers Within the Current Agency



Where: Agency > Billing > Voucher List



**Start:** To review all vouchers within the current Agency, you must first select into the **Agency** link followed by the **Billing** link located in the Left side navigation.

- Next, to get to the “Voucher Search” screen, click on the **Voucher List** link located in the Left side navigation.
- Once you are in the “Voucher Search” screen, you may search by using any of the available criteria or filters, or you may simply click **Go** to generate a list of all of the available vouchers within the Agency.
- The browser window will reload and the voucher list will now appear on the screen with a list of available vouchers. To review any of the vouchers, simply click on the [View](#) link. Note you will not be able to edit any of the data in the voucher since you are only reviewing the information.

**Voucher Search**

Provider Agency
LLH Provider 1

Provider Facility

Administrative Agency

Contracting Agency

First Name

Last Name

Client ID

Voucher#

Created on

Grant
ATR 3

2

Clear

Go

**Voucher List (Export)**

Vouch#	Payer	Provider Agency	Admin Agency	Intake Facility	Client	Effective Date	Status	Vouched Amt	Encumbered	Expended	Available	Actions
1	ATR3 [ATR3, 47438718734]	LLH Provider 1	LLH Case Manager	LLH Provider Facility 1	Mint, Martha	9/23/2010	Pending	\$60.00	0.00	0.00	60.00	<a href="#">View</a>
7	ATR3 [ATR3, 47438718734]	LLH Provider 1	LLH New Case Management	LLH Provider Facility 1	Bailey, Biff	9/28/2010	Active	\$575.00	230.00	0.00	345.00	<a href="#">View</a>
8	ATR3 [ATR3, 47438718734]	LLH Provider 1	LLH New Case Management	LLH Provider Facility 1	Smith, Sally	9/29/2010	Active	\$1,725.00	115.00	0.00	1610.00	<a href="#">View</a>
17	ATR3 [ATR3, 47438718734]	LLH Provider 1	LLH New Case Management	LLH Provider Facility 1	Bailey, Biff	10/5/2010	Declined	\$0.00	0.00	0.00	0.00	<a href="#">View</a>
18	ATR3 [ATR3, 47438718734]	LLH Provider 1	SM Case Management 1	LLH Provider Facility 1	Doe, Mary	10/7/2010	Active	\$1,725.00	115.00	0.00	1610.00	<a href="#">View</a>
26	ATR3 [ATR3, 47438718734]	LLH Provider 1	SM Case Management 1	LLH Provider Facility 1	Doe, Chris	11/1/2010	Closed	\$0.00	0.00	0.00	0.00	<a href="#">View</a>
30	ATR3 [ATR3, 47438718734]	LLH Provider 1	LLH Case Manager	LLH Provider Facility 2	Test, Client	11/15/2010	Pending	\$1,150.00	0.00	0.00	1150.00	<a href="#">View</a>



**Finish:** You have now reviewed available vouchers within an agency.

## 8. Creating Client Encounters



Where: *Client List > Activity List > Encounters*



**Start:** From the **Client List** screen, select a client and click on its corresponding **Activity List** link.

1. In the Client Activity List screen, search for encounters and click on its **Review** link.
2. From the "Encounter List" click on the **Add Encounter Record** to create a new Encounter for this client. Proceed to complete the required fields including:
  - a. **Note Type** – The type of note you wish to enter.
  - b. **Service** – Service you wish to render to the client.
  - c. **Program Name** – The name of the program the client is admitted to.
  - d. **Service Location** – Select from menu.
  - e. **Rendering Staff** - Field will be pre-populated with your login name.
  - f. **Start date** – The day the encounter is rendered.
  - g. **# of Service Units/Session** – this is limited by the units in a voucher.
3. Enter notes corresponding to the Encounter record. Click **Sign Note** to save the note with with your name, the date and time.
4. When you have completed creating the encounter, click on the **Finish** button.

**Client Activity List**

Activity	Activity Date	Created Date	Status	Actions
Client Information (Profile)	9/29/2010	9/30/2010	Completed	<a href="#">Review</a>
Intake Transaction	9/29/2010	9/30/2010	Completed	<a href="#">Review</a>
Encounter Summary	9/30/2010	9/30/2010	Not Applicable	<a href="#">Review</a>

**Encounter List(Export)**

Svc Date	Service	ENC ID	Rendering Staff	Program Name	Status	Actions
9/30/2010	Housing	8	Heller, Laura	ATR 3	Released	<a href="#">Review</a>

**Encounter for Miller, John**

Note Type:  Created Date:

ENC ID:  Service:

Program Name:  Start Date:  End Date:

Service Location:  Start Time:  End Time:

Duration:  # of Service Units/Sessions:

Rendering Staff:

Unsigned Notes:  [Sign Note](#)

Signed Notes:

Administrative Actions:

[Release to Billing](#) [Cancel](#) [Save](#) [Finish](#)

Continued on the next page...

**Note:** The service list shows only services that belong to active vouchers within the current episode. No encounter can be created for services on a closed voucher.  
A signed note is required to save any encounter record.



Where: Agency > Billing > Encounter

Continued from previous page...

5. Once you have finished creating the encounter, you will be returned to the “Encounter List” screen. Notice that the encounter you have just created appears in the list, and its status is “Not Released”. To see the details of the encounter or to release the encounter to billing, simply click on the [Review](#) link located under the actions column.
6. Note that when you return to the “Encounter” screen the Administration Actions area will now display two options, [Release to Billing](#) and [Delete](#). If the encounter is ready to be processed for billing, you will have to click on the [Release to Billing](#) link. If you entered the encounter by mistake or if you want to erase this newly created encounter, you may click on [Delete](#).
7. Once you have completed reviewing the encounter and/or released it to billing, continue by clicking on the **Finish** button. Also, if you ever wish to check the billing status of an encounter, check the “Status” column in the “Encounter List” screen.

Encounter List (Export)						Add Encounter Record	
Svc Date	Service	ENC ID	Rendering Staff	Program Name	Status	Actions	
11/11/2010	Housing	44	test, nish	ATR 3	Not Released	<a href="#">Review</a>	
9/30/2010	Housing	8	Heller, Laura	ATR 3	Released	<a href="#">Review</a>	

### Encounter for Miller, John

Note Type: **Case Management Note** | Created Date: 2/7/2012 9:32 AM

ENC ID: 116 | Service: **Group Counseling** | Program Name: **Main/ATR 3 : 1/1/2011 -**

Service Location: | Start Date: **2/1/2012** | End Date: | Start Time: | End Time: | Duration: | # of Service Units/Sessions: **2**

Rendering Staff: **Schnoor, Kory**

Unsigned Notes

Signed Notes  
Signed by Kory Schnoor, 2/7/2012 9:31:07 AM:  
Client Miller seen for treatment.

[Sign Note](#)

Administrative Actions

[Release to Billing](#) [Delete](#)

**Cancel Save Finish**

**Note:** You may not be able to release an encounter to billing if the number of units in the encounters is greater than the voucher's available amount, if the date of services doesn't belong to the voucher date, if the voucher is closed or if you exceed your available monthly cap amount.



**Finish:** You have now created and released/or deleted an encounter.

## 9. Reviewing and Editing Client Encounters



Where: *Client List > Activity List > Encounters*



**Start:** From the **Client List** screen, select a client and click on its corresponding **Activity List** link.

1. In the Client Activity List screen, search for encounters and click on the **Review** link.
2. The resulting screen, called "Encounter List", will display a list of encounters for that client including:
  - **Service date:** The date of the encounter
  - **Service:** The service rendered for the encounter
  - **Status :** The status of the selected encounter
 To continue, select an encounter and click on the **Review** link.
3. When the encounter record appears, you will be able to update and edit any field that is not in Gray or Read-only. You may add additional notes to the Encounter by typing in the "Unsigned Notes" text box and clicking **Sign Note**. This action will save additional notes with your name, date and time. Once you have made your changes click on **Finish** to save and complete your changes.

### Client Activity List

Activity	Activity Date	Created Date	Status	Actions
Client Information (Profile)	9/29/2010	9/30/2010	Completed	<a href="#">Review</a>
Intake Transaction	9/29/2010	9/30/2010	Completed	<a href="#">Review</a>
Encounter Summary	9/30/2010	9/30/2010	Not Applicable	<a href="#">Review</a>

### Encounter List(Export)

Enc Date	Service	ENC ID	Rendering Staff	Program Name	Status	Actions
11/23/2010	GPRA Assessments	51	Thakker, Nishita	ATR 3	Not Released	<a href="#">Review</a>
11/23/2010	GPRA Assessments	48	Heller, Laura	ATR 3	Released	<a href="#">Review</a>

### Encounter for Miller, John

Note Type: **Case Management Note**

ENC ID: **116** Created Date: **2/7/2012 9:32 AM**

Service: **Group Counseling**

Program Name: **Main/ATR 3 : 1/1/2011 -**

Service Location:

Start Date: **2/1/2012** End Date:

Start Time:  End Time:

Station:

# of Service Units/Sessions: **2**

Rendering Staff: **Schnoor, Kory**

Unsigned Notes

Signed Notes

Signed by Kory Schnoor, 2/7/2012 9:31:07 AM:  
Client Miller seen for treatment.

[Sign Note](#)

Administrative Actions: [Release to Billing](#) [Delete](#)

[Cancel](#) [Save](#) [Finish](#)



**Finish:** You have now reviewed and edited encounters.

## 10. Reviewing and Adjusting Claims



Where: Agency > Billing > Claim Item List



**Start:** In the Agency module, click on the **Billing** link followed by the **Claim Item List** located in the left-side navigation and you will see the “Claim Item Search” screen. When you first arrive at the Claim Item Search screen by default the claim item list will display results by Item Status “All Awaiting Review”.

- To search for a specific claim item or to filter your results, enter your data in the available search fields. When you have made your selection click on the **Go** button to view your results. Note, you may also click on the **Go** button to see all of the available claims, but be sure that there is not data or selection in the Claim Item Search fields.
- When your list appears, the claim item list will show you the following:
  - Client Name** – name of client record
  - Service** – service code
  - Status** – billing status of claim
  - Release Date** – date the claim item is billed
  - Charge** – total amount billed
- Next, click on the **Profile** link located under the actions column to view the client claim item.

**Claim Item Search**

Plan: [Dropdown] Group Enrollment: [Dropdown] ENC ID: [Text]  
 Client First Name: [Text] Client Last Name: [Text] Charge: [Text]  
 Subscriber/Resp Party First Name: [Text] S/R Party Last Name: [Text] Service: [Text]  
 Subscriber/Resp Party Account #: [Text] Rendering Staff: [Text] Service Date: [Text]  
 Authorization #: [Text] Facility: [Dropdown]  
 Item Status: [Dropdown]

**Claim Item List (Export)**

Item #	Client Name	Service Date	Service	Duration	Status	Release Date	Charge	Actions
11	4627, 4627	9/8/2009	H0001	60 Min	Released	9/22/2009	\$0.04	<a href="#">Profile</a>
12	4627, 4627	9/10/2009	H0001	780 Min	Awaiting Review	9/23/2009	\$0.54	<a href="#">Profile</a>
	Test, DAR	10/28/2009	36415	60 Min	Batched	10/28/2009	\$10.00	<a href="#">Profile</a>
	Test, DAR	10/28/2009	A0110/59/76/77/H9	90 Min	Batched	10/28/2009	\$22.00	<a href="#">Profile</a>
	Test, DAR	10/28/2009	S0215	60 Min	Batched	10/28/2009	\$44.00	<a href="#">Profile</a>
28	Test, DAR	10/28/2009	J3490/59/76/77/H9	420 Min	Batched	10/28/2009	\$0.03	<a href="#">Profile</a>
29	Test, DAR	10/28/2009	36415	193 Min	Batched	10/28/2009	\$10.00	<a href="#">Profile</a>
31	Test, DAR	10/28/2009	36415	15 Min	Batched	10/28/2009	\$40.00	<a href="#">Profile</a>

**Note:** When an encounter is released to billing, a claim item is automatically created with a Released status, and it can be reviewed from this screen.

Continued on the next page...





Where: Agency > Billing > Claim Item List

Continued from previous page...

4. You will now see the “Profile for Claim” screen appear. This screen will display all of the claim information and will allow you to make a claim item adjustment. Note that you will only be able to edit a few active fields, as the remaining fields will be read-only fields as indicated in Gray.
5. Next you will have the option of changing the status of the claim item. The Administrative Actions will vary based on the Claim item status. If the claim item is **Released**, choose from the following actions in the Administrative Actions box:
  - a. [Awaiting Review](#) – This action link will indicate that the claim is awaiting review and approval to release.
  - b. [Hold](#) – This action link will indicate that the item is pending and isn’t ready to be batched and billed.
  - c. [Reject \(Back Out\)](#) – This action link will indicate that the claim item may not be billed. Once the claim is rejected, the encounter will appear in red in the encounter list. The user will then be able to delete the encounter or make any changes and release it to billing again.
6. Note that when you have made your selection, the browser window will reload and the claim status is changed. Click on **Finish** to save and complete your action.

**Profile for Claim Item # 37 for Test, Client**

ENC ID: 45      Delivered Service: 2030

Program: ATR 3      Service Start: 11/16/2010 12:00 AM

Diagnoses: / /      Service End: 11/16/2010 12:00 AM

Pregnant:      Duration: 1 Days

Status: Released      # Sessions/Units: 2

Rendering Staff: test, nish

**Service Fee**

Billing Units: 1.00 X Rate / Unit: \$115.00 = \$115.00

Cost Center: [Dropdown]

Billing Note: [Text Box]

Group Enrollment: ATR3 [ATR3, 47438718734]      Encounter Post Date: 11/16/2010

Plan: ATR3      Created Date: 11/16/2010 6:12 PM

Payor Billing Service: Housing: 2030

Service Location: [Dropdown]

Unit Desc: 1 unit = 1 Days

Authorization: 30-2030      Available: 1035.0

Available to pay this claim item: 1035.0000

**Administrative Actions**

[Awaiting Review](#)   [Hold](#)   [Reject \(Back Out\)](#)

**Buttons:** Cancel, Save, Finish

**Note:** A claim item with a Released status is ready to be batched and billed by the automated process.

Continued on the next page...



Where: Agency List > Billing > Claim Item List

Continued from previous page...

7. If you are reviewing the Profile of a **Batched** Claim item you will be able to choose from the following actions In the Administrative Actions box:
  - a. **Reverse** – This selection will create a reverse transaction of the original claim item. The charge will appear as a negative amount on the Claim Item List screen.
  - b. **Adjust** – This selection will create a reverse transaction of the original claim item as well as a new claim corresponding to the adjustment you just entered. The Claim Item List screen will then show two claim items: negative charge and the adjusted amount.
8. Once you have clicked on any of the two available actions, click on the **Yes** button to continue.
9. Complete your selection by clicking on the **Finish** button to go back to the Claim Item List screen.

**Note:** The reversal and adjustment claim items are automatically created with the released status. They will then be batched and billed when the next process runs.



**Finish:** You have now made a billing adjustment.

Administrative Actions: [Reverse](#) [Adjust](#) **7**

Are you sure that you want to adjust this claim item?

**Yes** **No** **8**

**Profile for Claim Item # 45 for Smith, Richard**

ENC ID: 15 Delivered Service: 2010  
 Program: ATR 3 Service Start: 9/30/2010 12:00 AM  
 Diagnoses: / / Service End: 9/30/2010 12:00 AM  
 Pregnant: Duration:  
 Status: Released # Sessions/Units: 1  
 Rendering Staff: Hutton, Shawn

Service Fee  
 Billing Units: 1.00 X Rate / Unit: \$95.00 = \$95.00  
 Cost Center:   
 Billing Note:   
 Group Enrollment: ATR3 (ATR3, 465132132) Encounter Post Date: 9/30/2010  
 Plan: ATR3 Created Date: 11/23/2010 6:30 PM  
 Payor Billing Service: GPRA Assessments: 2010  
 Service Location:   
 Unit Desc: 1 unit =   
 Authorization: 3-2010 Available: \$95.00  
 Available to pay: \$95.00000  
 Administrative Actions: [Awaiting Review](#) [Hold](#) [Delete](#)

**Cancel** **Save** **Finish** **9**

**Note:** When the intake is closed, all the vouchers related to this intake are closed. You may re-open the intake if necessary. You need to be granted the "Case Re-open" role to do so.

## 11. Reviewing Agency Payments



Where: Agency > Billing > Payment List



**Start:** To begin, you must first click into the **Billing** module followed by the **Payment List** link located in the left side navigation.

- When you first see the “Payment List” screen, you will not see any records under the payment list. To generate a list, enter in your search criteria in the “Payment Search” section and click the **Go** button.
- Notice that the browser window will reload and the results list will appear on the bottom half section of the screen. Here you will be able to see all of the claims which have been released to billing and are ready for payment, including the following information:
  - Payment #** – the payment ID
  - Payor Name** – the name of the agency making the payment
  - Posted** – the day the claim item was submitted for payment
  - Payment Amount** – the dollar amount that is being billed and requires payment
  - Unapplied Amount** – the amount remaining which has not been paid
- Next, click on the **Profile** link located under the actions column to view a payment item.

*Continued on the next page...*

### Payment Search

Payor Plan:

Client:

Pmt #:

Posted Date:

Reference:

Payment Amount:

Unapplied Amount:

Contractor:

Clear

Go

### Payment List (Export)

[Add Contract Payment](#)
[Add Client Payment](#)
[Add Plan Payment](#)

Pmt #	Payor Name	Posted	Payment Amount	Unapplied Amount	Intended For	Created By	Actions
74	6136, test	3/18/2010	\$2.00	\$2.00		Administrator, WITS	<a href="#">Profile</a>
51	admission, test	9/25/2009	\$10.00	\$10.00		test, Provider	<a href="#">Profile</a>
38	Client, Michael	7/7/2009	\$1.00	\$1.00		George, Michael	<a href="#">Profile</a>
28	MOORE, Mickey	12/1/2008	\$15.00	\$15.00		Moore, Sarah	<a href="#">Profile</a>
27	Private Pay	11/7/2008	\$150.00	\$150.00		Moore, Sarah	<a href="#">Profile</a>

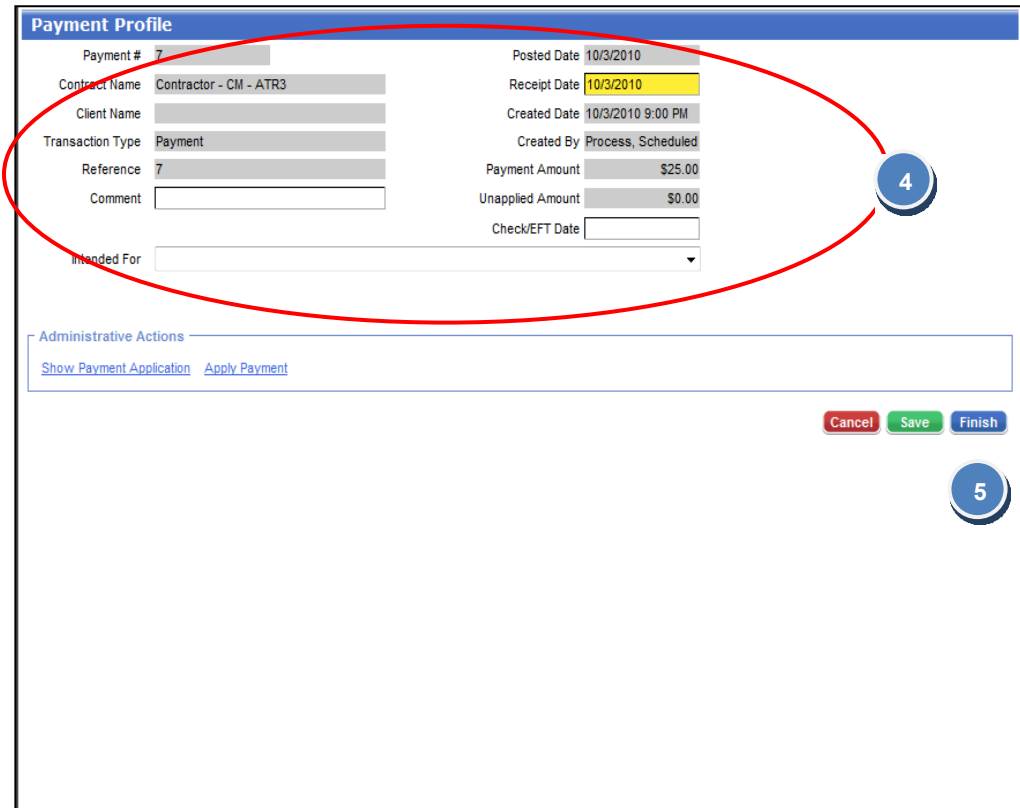
Total Payment: \$178.00



Where: Agency > Billing > Payment List

Continued from the last page...

4. Now you will see the “Payment Profile” screen. Proceed and complete any necessary information including:
  - a. **Comment** – This will be any note related to accounting or billing.
  - b. **Receipt Date** – By default this will be the day the payment is to be posted; however, this is an editable field.
  - c. **Intended For** – This will almost always be an account (or existing contract).
5. Next, click on the **Finish** button if you wish to save your changes and complete review of the payment profile. You will now be taken back to the “Payment List” screen.



Payment Profile	
Payment #	7
Contract Name	Contractor - CM - ATR3
Client Name	
Transaction Type	Payment
Reference	7
Comment	
Posted Date	10/3/2010
Receipt Date	10/3/2010
Created Date	10/3/2010 9:00 PM
Created By	Process, Scheduled
Payment Amount	\$25.00
Unapplied Amount	\$0.00
Check/EFT Date	
Intended For	

Administrative Actions

[Show Payment Application](#) [Apply Payment](#)

Cancel Save Finish



**Finish:** You have now reviewed an agency payment profile.

## 12. Reviewing EOB Transactions



Where: Agency > Billing > EOB Transaction



**Start:** To begin, you must first click into the **Billing** module followed by the **EOB Transaction List** link located in the left side navigation.

1. Next, you will see the “EOB Transaction List” screen. Proceed by entering in your search criteria and clicking on the **Go** button.
2. Once the web browser page reloads, you will see a list of EOB transactions generated in the bottom half of the screen.



**Finish:** You have now reviewed an EOB Transaction List.

### EOB Transaction Search

EOB Transaction Type

Client Name

Payment #

Payor Name

Enc #

Clear

Go

### EOB Transaction List / Export

Enc #	Client Name	Svc Date	Transaction Type	Adjustment Reason	App Amt	App Date	Pmt #	Payor Name	Actions
19	Smith, Richard	9/30/2010	Payment		\$25.00	10/3/2010	7	Contracting Agency - 465132132	
15	Smith, Richard	9/30/2010	Payment		\$95.00	10/3/2010	8	Contracting Agency - 465132132	
3	Smith, Richard	9/28/2010	Payment		\$95.00	10/3/2010	9	Contracting Agency - 465132132	

**Note:** The EOB transaction list export will show not only the detail of the payment application, but also the reason for the denial of a particular payment.